

Face Sheet

OMB No. 3137-0048

08/31/2005

CFDA No. 45.301

1. Applicant Organization
Ackland Art Museum, The University of North Carolina at Chapel Hill

2. Institutional Mailing Address
Campus Box #3400

3. City
Chapel Hill

4. State
NC

5. Zip Code
27599-3400

6. Web Address www.ackland.org

7. DUNS Number (9 digits) 608195277

8. TIN Number (9 digits) 56-600-1393

9. Name and Title of Project Director ☐ Mr. ☒ Ms. ☐ Dr.
Beth Shaw McGuire, Senior Museum Educator

10. Business Phone of Project Director
919.962.0479

11. Project Director Mailing Address
Campus Box #3400

12. City
Chapel Hill

13. State
NC

14. Zip Code
27599-3400

15. Fax Number of Project Director
919.966.1400

16. E-mail Address of Project Director
bas5705@email.unc.edu

17. Name and Title of Authorizing Official
Tony G. Waldrop, Vice Chancellor for Research

18. Business Phone of Authorizing Official
919.966.3411

19. Authorizing Official Mailing Address
Office of Sponsored Research, UNC-Chapel Hill, 104 Airport Drive, Ste. 2200

20. City
Chapel Hill

21. State
NC

22. Zip Code
27599-1350

23. Email Address of Authorizing Official resadminors@unc.edu

24. Sponsoring institution if applicable (e.g., municipality, state, or university)
☒ check if this entity will manage funds if an award is made. Name and address:
The University of North Carolina at Chapel Hill

25. Is the applicant organization university controlled? ☒ yes ☐ no

26. Governing control of applicant ☒ State ☐ Municipal ☐ County ☐ Private Non-Profit
☐ Tribal Government ☐ Other, please specify _____

27. Type of organization (check one)

<input type="checkbox"/> Aquarium	<input type="checkbox"/> Nature Center
<input type="checkbox"/> Arboretum/Botanical Garden	<input type="checkbox"/> Natural History/Anthropology museum
<input checked="" type="checkbox"/> Art museum	<input type="checkbox"/> Planetarium
<input type="checkbox"/> Children's/youth museum	<input type="checkbox"/> Science/technology museum
<input type="checkbox"/> General museum*	<input type="checkbox"/> Zoo
<input type="checkbox"/> Historic house/site	<input type="checkbox"/> Specialized**
<input type="checkbox"/> History museum	<input type="checkbox"/> Other _____

* A museum with collections representing two or more disciplines equally (e.g., art and history).

** A museum with collections limited to one narrowly defined discipline (e.g., textiles, stamps, maritime, ethnic group).

28. Museum's attendance for the 12-month period prior to the application.

Onsite 40,473 Offsite 1,942 Electronic 667,000

29. Total number of hours the museum was open to the public for the 12-month period prior to application. 1638

30. Year the Museum was first open and exhibiting to the public. 1958

31. Number of full-time paid museum staff 18 32. Number of part-time paid museum staff 4

33. Number of full-time unpaid museum staff 0 34. Number of part-time unpaid museum staff 88

35.-36.

Fiscal Year	Revenue/ Support/Income	Expenses/ Outlays	Budget Deficit (if applicable)*	Budget Surplus (if applicable)
Most recently completed FY 20 <u>04</u>	\$ 1,567,403	\$ 1,446,123	(\$ -0-)	\$ 121,210
Second most recently completed FY 20 <u>03</u>	\$ 1,151,811	\$ 1,442,220	(\$ -0-)	\$ 89,591

* If Institution has a budget deficit for either of the two most recently completed fiscal years, please attach a single sheet behind this face sheet to explain the circumstances of this deficit.

37. Amount Requested \$ 16,320

38. Amount of Matching Funds \$ 27,010

39. Grant Period (Starting Date) 08 / 01 / 05 — 12 / 31 / 06 (Ending Date)
(must begin between 8/1/05 -10/31/05)

40. Please check project type category (check only one category)

☐ Sustaining Cultural Heritage

☒ Supporting Lifelong Learning

☐ Serving as Centers of Community Engagement

41. Project Title FYI: The Ackland Family and Youth Initiative

42. Institution Name Ackland Art Museum, The University of North Carolina at Chapel Hill

43. In the space below, summarize the project activities (2,000 maximum character count).

The Ackland Art Museum seeks funds to support the pilot programs of FYI: the Ackland Family and Youth Initiative. This new, long-range initiative will develop a template for content-rich gallery guides, activities, and programming designed expressly for youth and families as non-academic, lifelong learners. Using the artistic and intellectual capital of the Ackland and UNC-Chapel Hill, FYI builds on the Museum's existing outreach to local communities and service to educators at every level and establishes the Museum as a vital resource for families and youth. In keeping with the Ackland's mission, strategic plan, and core values, the Ackland identifies four goals for FYI: (1) Increase awareness of the Museum as a resource for lifelong learning, (2) Increase our institutional capacity to serve our local community and national partners, (3) Provide free programs and printed materials to families and youth in order to enliven their exploration of works of art in the permanent collection and major traveling exhibitions, and (4) Evaluate the effectiveness of focused programming for non-academic audiences. FYI will conduct activities within two broad categories: materials and events related to the permanent collection and materials and events related to temporary or traveling exhibitions. In both categories FYI will design, publish, and distribute free materials for family and youth visitors to prompt deeper investigation of the Museum's exhibitions and collections, while stimulating family interaction and individual creativity. In addition, FYI will sponsor free public programming designed for family and youth audiences. FYI will demonstrate the Ackland's commitment to refining these offerings by maintaining a protocol of development and review that allows us to improve and expand our service to families and youth in the coming years. At the end of this grant period the Ackland will support FYI through regular programming and materials line item for major exhibitions.

44. Certification:

Liane L. Sanford

Signature of Authorizing Official

Acting For
Tony G. Waldrop

11-12-04

Date

Ackland Art Museum at the University of North Carolina at Chapel Hill

Strategic Plan Summary

Strategic Plan: History

The Ackland initiated its first strategic planning process in 1994 after the arrival of Dr. Gerald D. Bolas as director. Ben Helms Consulting facilitated a process that incorporated museum staff and the Ackland's National Advisory Board and Administrative (Faculty) Advisory Committee. The resulting 38-page plan outlined goals and objectives that would guide the long-term programmatic and budgetary decisions for the Museum. The 1994 goals and objectives established an evolving framework influencing budget allocation, performance evaluation, and, most importantly, guiding artistic priorities within and among acquisitions, exhibitions, interpretive strategies, and programs. Based on the 1994 goals and objectives, from 1995 to 1998 museum staff revised its strategic plan through *ad hoc* committee work and annual staff retreats. These revisions were reviewed by the Museum's National Advisory Board and Administrative Advisory Committee to establish alignment between volunteer and staff leadership. Further, strategic directions were shaped in concert with university priorities, for instance, the growing emphasis on globalization. The following strategic "themes" have guided initiatives throughout the museum including museum expansion, the *Five Faiths Project*, recruitment of promised collections, acquisitions, and development of the Education Resource Center.

1. Increase collaboration with three key constituencies: the university community of faculty, students, staff, and alumni; the K-12 community of teachers, parents, and students; and outside experts, including artists, collectors, and academic specialists across the country
2. Diversify the Museum in three key areas: (a) art in temporary and long-term installations, specifically by increasing our presentations of Asian and contemporary art by borrowing from alumni, booking exhibitions, and making significant acquisitions; (b) the types and styles of gallery installation and attendant interpretive strategies; and (c) board leadership, membership base, and donor-related activities
3. Frame the Museum's temporary shows, long-term installations, acquisitions, and interpretive strategies within an academically-inspired "four-year curriculum" of core competencies for understanding visual art. Based on strengths of the collections, museum staff and university faculty orchestrate over a four-year cycle a curriculum emphasizing the traditions of Western art (classical, old master, and 19th-century European art), non-Western art (Asian and African art), American art, and contemporary art presented in a global framework
4. Transform institutional culture to embrace service to our constituencies as a core value that we express in our work by enabling all visitors to feel welcome and competent in our museum, providing memorable gallery experiences, advancing lifelong learning outside the classroom, and implementing continuing evaluation of institutional service to constituencies
5. Develop our website and other media-based curricular and interpretive tools in concert with providing online access to our collection through our website (www.ackland.org)

The Ackland staff has been reorganized to address these specific strategic themes. For example, to address themes two, three, and four, the curators, registrars, and preparators whose units once reported independently to the director have been organized into an integrated "Art Team" led by the newly created position of assistant director for art and education. In response to theme five, an intradepartmental technology committee now meets monthly to assess the status of projects like the collection database, website development, and server use and makes recommendations for improvements throughout the museum.

Advancement of these strategic directions has rewarded the museum with increased participation by all constituent groups; growing private financial support despite a stagnant economy; increased demand for university and K-12 curricular support (such as tours, collaborations on teaching exhibitions, and requests to view art in storage) to the point that we can no longer accommodate all requests; and new promises of significant collections to the point where we must expand our facility to accommodate them in the future (e.g., Patton collection of modern and contemporary art, Shatzman collection of Chinese ceramics, and private collection of Japanese art; see www.ackland.org for details).

Strategic Facility Expansion

By 1998 it became clear that facility growth was essential to enable continued fulfillment of the museum's mission. Articulation of a building program required detailed study of every facet of the museum to enable incorporation of the existing facility into a larger structure that will not only increase current capacity but transform the experience of visitors. In fact, the vision for the "New Ackland" contributed to a university-wide effort during 2001 and 2002 to envision and master plan an "Arts Common" adjacent to the expansion site that will establish the museum as the new front door to the university. Thus the Ackland's mission, vision, and strategic plan are now woven into the fabric of the university's vision for its future, its campus master plan, *Carolina First*—the university's \$1.8 billion fundraising campaign, and the town of Chapel Hill's vision for its downtown retail community adjacent the Ackland's expansion site and Arts Common.

Strategic Directions for the Next Decade

Extending the strategic themes noted above (collaboration, diversification, four-year curriculum, service, and technology), the following strategic directions are currently being charted by *ad hoc* staff teams with volunteers (board members and faculty) serving as consultants.

1. **Implement and evaluate differentiated interpretive strategies throughout the Museum.** The curatorial team, working with the National Advisory Board, has spent the last year examining the ways in which we currently interpret art through gallery installations and educational materials available to visitors. The outcome is institutional commitment to a flexible and interdisciplinary approach to interpretation coupled with differentiation throughout the museum. For example, in some galleries art may be highly interpreted through texts or electronic media, while elsewhere "splendid isolation" may be the best strategy to encourage contemplation of a single great object. Typically, we will present multiple perspectives from our extensive archive of texts, voice, music and video files authored by museum staff, faculty, university and K-12 students, faith leaders and practitioners, and artists. New to our approach is our commitment to evaluate the visitor experience of our museum in collaboration with faculty and students from the UNC-Chapel Hill School of Information and Library Science.
2. **Increase opportunities for lifelong learning and enjoyment in the Museum.** The Ackland currently does an outstanding job of engaging learning constituencies in curricular projects in the museum, activities guided by staff, faculty, and volunteer docents. However, self-guided visitors like families, retired senior citizens, or those seeking brief midday respite experience only a fraction of our available enrichment resources. The Education Resource Center (ERC) will provide a home for visitor reception, staff for personalized orientation and reference service, and tools for self-guided discovery throughout the museum and across campus.
3. **Enable every visitor to access learning opportunities across our campus.** As a university art museum, we will integrate interdisciplinary interpretive strategies with orientation and self-guiding tools. ERC student staff will alert visitors to the ways in which faculty and student insights are visible and audible throughout the Museum. In this and other ways, we will help visitors learn about educational opportunities across campus and explore the resources of our university.
4. **Expand the Museum as part of the "Arts Common."** In 2003 we selected the Polshek Partnership to design a museum expansion that approximately doubles the size of the current museum to 75,000 g.s.f. While increasing capacity for collections, exhibitions, and programs, the building program will enhance mission fulfillment and visitor experience through the creation of four new teaching and learning facilities: an Education Resource Center, a "smart classroom," a studio classroom, and a community event room. The project is organized into three phases, the first of which is estimated at \$20 million.
5. **Ensure a successful capital campaign and long-term financial stability.** We will expand our salary base through endowment raised as part of our capital campaign, increased unrestricted giving, increased multiyear grant funding, and new corporate partnerships. We will diversify earned income in a new facility with a museum shop and increased facility rental. Construction will be funded by private investment rewarded with naming opportunities. The state will maintain the new facility.

1. PROJECT DESIGN: Description and Overall Goals

The Ackland Art Museum seeks funds from IMLS to support the pilot programs of *FYI: The Ackland Family and Youth Initiative*. This new, long-range initiative will develop a template for content-rich gallery guides, activities, and programming designed expressly for youth and families as non-academic, lifelong learners. Using the artistic and intellectual capital of the Ackland and the University of North Carolina at Chapel Hill, *FYI* builds on the Museum's existing outreach to local communities and service to educators at every level and establishes the Museum as a vital resource for families and youth.

For the purposes of this project, the Ackland defines "family" as any household that supports and nurtures children (infants - age 18) and "youth" as young people between the ages of 13 and 18. IMLS funds will allow the Museum to pilot this program, create a template for *FYI* gallery guides and programming that encourage lively interaction with works of art, generate content related to two major exhibitions over an eighteen month period, publish, advertise, and evaluate the products and visitor experiences. At the end of the grant period the Ackland will continue *FYI: The Ackland Family and Youth Initiative* as a new community-based initiative and a central offering in the Ackland's public service.

The next two years offer a unique and unprecedented opportunity for the Ackland to begin this effort. During 2005-2006, the Ackland will open two major exhibitions, accompanied by the publication of scholarly catalogues. These exhibitions highlight the significance of the Ackland's relationship with the University, the creativity of the Ackland staff, and the Ackland's distinguished collection. *FYI* will begin with these two exhibitions. The first exhibition, opening in December 2005, *Family Legacies: The Art of Alyson, Betye, and Leslie Saars* is the first major retrospective of the works of the Saars family. The Ackland is committed to including contemporary art in our regular schedule of exhibitions. Based on enthusiastic visitor responses to our exhibitions of contemporary art, and in light of promised gifts (such as the collection of Jim and Mary Patton, published in the catalogue *Space, Abstraction and Freedom*), the Ackland is positioned to become a center in the south east region of the United States for the study and appreciation of contemporary art. This exhibition is particularly significant because national and international interest in these artists is high. *Family Legacies* will explore themes in each of the artist's works while also unifying the works through an exploration of common threads and family connections. The exhibition was organized by Ackland curator of exhibitions, Barbara Matilsky, and will tour to the Pasadena Museum of California Art (*April to September 2006*), San Jose Museum of Art in California (*October 2006 - January 2007*), and the Palmer Museum of Art, Penn State University (*January - April 2007*) is scheduled to tour to three additional venues in 2006 and 2007. *FYI* materials developed for *Family Legacies* will be made available to the three venues for use with their audiences.

The second exhibition, *The Body of God: Encountering South Asian Sculptures in the Ackland's Permanent Collection*, will open in the fall of 2006. Co-curated by Carolyn Wood, Ackland assistant director for art and education and Pika Ghosh, University scholar, this exhibition will reinstall and reinterpret our distinguished collection of South Asian sculptures. *The Body of God* will explore these works through the scholarship of University partners, voices from local faith communities, and installations that evoke the objects' original contexts. The Ackland anticipates that this exhibition will also be accompanied by a scholarly catalogue (pending funding). Because the Ackland's Asian collection is typically on display in the Yager Gallery of the Museum, *FYI* materials developed for *The Body of God* will become permanent resources for our visitors.

By establishing these two exhibitions as the pilot programs for *FYI* (one focusing on the permanent collection and one on a major touring exhibition originating at the Ackland, see attached summaries),

FYI increases our institutional capacity to meet the needs of local families and youth and the needs of museum partners nationwide. At the end of this grant period (December 2006) the Ackland will support *FYI* through regular programming and materials line item for major exhibitions.

FYI Background

In the past ten years, the Ackland has established itself as a trusted and engaging resource for the teaching and learning needs of four constituencies:

1. The academic community of the University of North Carolina at Chapel Hill.
 - Each year, the Museum serves more than 6,000 undergraduate and graduate students in the galleries with content related directly to core curricular goals.
 - *Student Friends of the Ackland*, a project begun in 2004, attracted more than 200 university students to opening events.
 - *The Window to the Humanities* exhibition program generates six exhibitions a year in collaboration with university faculty and students. These exhibitions establish works of art from the Ackland collection as primary source material for specific University classes.
2. K-12 public and private schools
 - Each year, the Ackland welcomes 5,000 K-12 students from across the region into the galleries for single- and multiple- visit programs.
 - The education department of the Museum tailors gallery activities to fulfill the learning objectives of individual teachers and the Standard Course of Study developed by the North Carolina Department of Public Instruction.
3. Local communities of interest
 - Attendance at the Ackland averages close to 45,000 visitors each year.
 - *The Five Faiths Project* (see attachment) has established the museum as a location for teaching and learning about five of the world's major religious traditions.
4. Internet users at www.ackland.org
 - The Ackland has an award-winning website, visited by close to a million unique visitors from 130 countries each year.
 - The *On-Line Collection Interface* allows web visitors to search the collection database for images and information related to the 15,000 works in our permanent collection.

In evaluating our service to these communities, the Ackland recognized that our main focus and greatest success have been in curriculum-centered programs that enhance appreciation for and understanding of works of art.

Over the same ten-year period, the Ackland has occasionally offered programming for children, created "Family Fun" activity sheets, and sponsored exhibitions that address the concerns of youth and families. In particular, *In Our View* (2002) invited area students to respond to works of art in the Ackland collection. This effort culminated in an exhibition of works of art created by middle school students (see enclosed brochure and project description). *Seeking the Self* (2003) was a semester-long after-school program for at-risk students developed in collaboration with the Blue Ribbon Mentor-Advocate Program. Another example, *Visions of Faith* (1998), engaged children from area faith communities with documentary photographer, Wendy Ewald, in order to create an exhibition and catalogue of photographs taken by local children (postcard enclosed).

FYI is designed to build on the strengths of the Ackland's previous work and establish an on-going, systematic approach to engaging families and youth. We prioritized this new target audience after consideration of our strategic plan and the potential demonstrated in the Museum's current offerings. The strategic plan establishes increased collaboration with members of our local communities as our highest priority. For every child who attends the museum as part of a school-based program, there is a family unit that might benefit from resources and programming designed to enrich their experience with works of art. For every teen who attends the museum as part of their school work, there is a circle of friends who might be engaged in the value of art and ideas as vehicles for transformation. Likewise, our outreach to university departments across the arts and sciences should include outreach to the families of faculty members.

FYI Goals

In keeping with the Ackland's mission, strategic plan, and core values, the Ackland identifies four goals for *FYI*:

1. Increase awareness of the Ackland Art Museum as a resource for lifelong learning.
2. Increase our institutional capacity to serve our local community and our national partners.
3. Provide free, content-rich programs and printed materials to families and youth in order to enliven their exploration of works of art in the Ackland's permanent collection and major traveling exhibitions.
4. Evaluate the effectiveness of focused programming for non-academic audiences.

FYI Activities

FYI: the Ackland Family and Youth Initiative will be directed by Beth Shaw McGuire, Ackland senior educator. *FYI* will conduct activities within two broad categories: materials and events related to the permanent collection and materials and events related to temporary or traveling exhibitions. In both categories, *FYI* will:

1. Design, publish, and distribute free materials for family and youth visitors. The Ackland will build on its strong archive of educational materials developed for K-12 students and generate materials for family group interactions with art. These materials will be placed in the galleries and in the Museum's education resource center. Volunteers at our visitor services desk will direct visitors to these resources.
 - Using the model of our existing exhibition brochures (see samples A and B), *FYI* will generate a multi-fold activity brochure designed to engage family groups for approximately 30 minutes in the galleries. This brochure will include activities such as:
 - *Look Closely*: viewing strategies for engaging children and adolescents
 - *Treasure Hunt*: directed viewing of particular works and/or details of a work
 - *Ask Me A Question*: discussion prompts
 - *Connections*: suggestions for interpretive connections between works of art and everyday life
 - *How do they do that?*: descriptions of techniques employed by artists
 - *Afterthoughts*: hands-on activities for families including writing and drawing prompts, storytelling ideas, craft ideas and recipes to be used after the visit
 - *FYI* will also produce one-page handouts that address the needs of youth with age appropriate readings and ideas for exploring the collection, such as:
 - *Make a "ZINE"*: prompts for creative responses to the collection

- *Did You Know?*: connections to ideas and information that build competence in the museum
 - *Close at Hand*: connections to local community organizations, campus groups, and resources that increase our understanding of works of art
 - *Are You Listening?*: insights from local community members
2. **FYI** will sponsor public programming, including evening programs and day long community celebrations that introduce the Ackland as a location for family-centered, non-academic encounters with art and ideas.
- Evening programs will target the youth audience with speakers and performers familiar with the needs of adolescents. For example, an open mike night at the Ackland at which local poets and singer songwriters respond to works of art.
 - Community celebrations will include hands-on activities with regional artists, craftspeople, and musicians.
3. **FYI** will advertise to families and youth through an established advertising plan and dedicated budget.
- Advertising in local print media and on-line listings with user demographics that reflect our target audience
 - “Take home” materials distributed to K-12 educators and students. **FYI** will produce two take home products:
 - A sticker for every child that reads: *FYI: I can show you the world at the Ackland Art Museum.*
 - A bookmark that features a selected work on the front and “*FYI: Look Closely*” on the back. *Look Closely* will facilitate an in-depth look at the featured work on the front of the bookmark. The bookmark will also provide families with basic information about the Ackland: hours, location, free admission(sample enclosed).
 - The Ackland’s website, newsletter (published three times a year), and e-news (published every three weeks).

In keeping with the Museum’s current practice, all **FYI** materials developed by Ackland educators will be reviewed by focus groups. For each **FYI**, the Ackland will convene three focus groups: one comprised of mentors and educators from the Blue Ribbon Mentor-Advocate Program (see attached organizational description in key personnel materials), one with parents, and one with teens. These focus groups will assist the Ackland in evaluating the materials and program offerings. Focus groups will consider how each activity and event:

1. Engages the target audiences.
2. Increases knowledge about works in the collection.
3. Develops skills useful in all museum settings.
4. Stimulates family interaction and individual creativity.

2. Grant Program Goals

FYI: the Ackland family and youth initiative addresses the IMLS goal of supporting lifelong learning by creating resources and programming that enhance the experience of families and youth in the museum. Our goal is to increase our ability to serve these audiences and to make the Ackland’s distinguished collection a significant resource for families and youth.

FYI is a necessary step in the fulfillment of the Museum's strategic plan. *FYI* expands the Ackland's service to children and teens, parents and grandparents, and all primary caregivers regardless of their family configuration, economic resources, or educational background. In keeping with the Museum's policy of free admission, all aspects of this new endeavor will be available to families and youth free of charge. *FYI* will demonstrate the Ackland's commitment to refining these offerings by maintaining a protocol of development and review that allows us to improve and expand our service to families and youth in the coming years.

3. How the Project Fits into the Strategic Plan and Mission.

The Ackland Art Museum is uniquely positioned to successfully embark on this new endeavor. *FYI: The Ackland Family and Youth Initiative* builds on the work of our existing curatorial and education programs, our relationships with University scholars and faculty, and our outreach to local communities. This project is the direct result of the Ackland's strategic plan, and a logical next step in increasing our service to lifelong learners. As stated in the enclosed Strategic Plan Summary, the Ackland's first strategic priority for the next ten years is to "implement and evaluate differentiated interpretive strategies throughout the Museum." *FYI* will be one approach to meeting this institutional mandate.

Capturing the imagination of small children, stimulating the curiosity of teenagers, and establishing the museum as a vital resource for families is also a direct response to the fourth strategic theme outlined in our strategic plan. As stated in our Strategic Plan Summary, *FYI* will enable families and youth to feel welcome and competent in our museum by "providing memorable gallery experiences, advancing lifelong learning outside the classroom, and implementing continuing evaluation of institutional service to constituencies."

In addition, the Ackland mission statement provides the guiding language for the development and assessment of *FYI*.

The Ackland Art Museum animates, inspires, and transforms people's lives with works of art. As an academic unit of the University of North Carolina at Chapel Hill, the Museum acquires, preserves, exhibits, and interprets works of art to fulfill the University's mission to provide teaching, research, and public service to the people of North Carolina.

(approved October 2004, National Advisory Board and November 2004, Office of the Provost)

FYI will strive to animate, inspire, and transform the lives of families and youth with works of art. The Ackland sees *FYI* as an investment in the institutional capacity of the museum to meet the needs of these audiences. We will assess the efficacy of advertising to families and youth, and evaluate the outcomes through user surveys. Based on the results of quantitative and qualitative evaluations, the Ackland will make adjustments to the programs and publications as we continue the initiative.

Because the Ackland is involved in a major capital campaign in preparation for expansion of the building, launching *FYI* at this time is ideal. *FYI* will build a new audience familiar with the resources of the Ackland and who will directly benefit from the expansion of the Museum and the surrounding Arts Common at the University. Master Plans for the Ackland and the Arts Common stress the importance of establishing this corner of the campus of the University of North Carolina at Chapel Hill as a destination for all people interested in the visual and performing arts. The Ackland is the first project slated for construction. In the expanded Ackland facility, the existing staff envisions programming for families and youth as one of the hallmark activities of the Museum and one of our unique offerings to the Arts Common, particularly on the weekends. The Ackland will use the next five years to establish *FYI*, develop resources and programs that meet the needs of families and youth, continually evaluate and refine those offerings, and increase our institutional capacity to continue to

serve these audiences in the expanded Ackland. At the end of the first five years of FYI, the Ackland will have a solid body of resource materials focused on the permanent collection and designed for families and youth.

1. Strategic Plan: Process and Financial Resources

The Ackland initiated its first strategic planning process in 1994 after the arrival of Dr. Gerald D. Bolas as director. Ben Helms Consulting facilitated a process that incorporated museum staff and the Ackland's National Advisory Board and Administrative (Faculty) Advisory Committee. The resulting 38-page plan outlined goals and objectives that would guide the long-term programmatic and budgetary decisions for the Museum. The 1994 goals and objectives established an evolving framework influencing budget allocation, performance evaluation, and, most importantly, guiding artistic priorities within and among acquisitions, exhibitions, interpretive strategies and programs. Based on the 1994 goals and objectives, from 1995 to 1998 museum staff revised its strategic plan through *ad hoc* committee work and annual staff retreats. These revisions were reviewed by the Museum's National Advisory Board and Administrative Advisory Committee to establish alignment between volunteer and staff leadership. Further, strategic directions were shaped in concert with university priorities, for instance, the growing emphasis on globalization.

By 1998 it became clear that facility growth was essential to enable continued fulfillment of the Museum's mission. Articulation of a building program required detailed study of every facet of the Museum to enable incorporation of the existing facility into a larger structure that will not only increase current capacity but transform the experience of visitors. In fact, the vision for the "New Ackland" contributed to a university-wide effort during 2001 and 2002 to envision and master plan an "Arts Common" adjacent to the expansion site that will establish the Museum as new front door to the University. Thus the Ackland's mission, vision, and strategic plan are now woven into the fabric of the University's vision for its future, its campus master plan, *Carolina First*—the University's \$1.8 billion fundraising campaign—and the town of Chapel Hill's vision for its downtown retail community adjacent the Ackland's expansion site and Arts Common. Concurrent with planning for operations in an expanded facility, we developed a ten-year financial plan to guide us in responsible growth of staff and programs by hiring an MBA from UNC-Chapel Hill's Kenan-Flagler School of Business. This plan presents multiple funding scenarios coupled with various ramp-ups to construction and growth in staff and programs. Experts on our National Advisory Board are now fine-tuning the plan.

2. Appropriateness of Project for Institution and Audience

The Ackland is situated in the midst of one of the most rapidly changing demographic areas of the country, one characterized by extremes in terms of educational as well as income levels; census statistics indicate the extraordinary opportunity before the Ackland to serve these disparate parts of our community through targeted offerings. The Raleigh-Durham-Chapel Hill metropolitan area (a.k.a the Research Triangle) has a population close to 1.2 million; since 2000, the region grew by 80,000 people, a full quarter of whom were immigrants, and the immediate environs of the Museum has become home to a burgeoning immigrant population. While 22% of North Carolina residents are African American, according to the 2000 census, 11% of Chapel Hill residents, 40% of Durham residents, and 28% of Raleigh residents are African American. Expanding Hispanic, Asian, and Middle-Eastern communities infuse additional cultural resources into an area traditionally marked by a Caucasian majority coexisting with an African American minority. While only 23% of North Carolinians over age 25 are college graduates, close to 46% of those in the Research Triangle have degrees, and 77% of Chapel Hill residents are graduates. Yet, in nearby Alamance County only 19% have graduated from college. Furthermore, Chapel Hill is home to a rapidly growing population of retirees, whose visiting

grandchildren are another natural audience for the Museum. The Ackland identifies all these households as potential audiences for *FYI*.

6. Project Resources: Time and Budget

The Ackland estimates that each *FYI* will require approximately four months for development. This will allow the Ackland to produce two rounds of *FYI* materials and programming per year, with several months in between for evaluation, assessment, and re-envisioning as needed. Each *FYI* will require four steps in advance of the opening of an exhibition, and one final step at the end of the programming:

1. Preparation: Under the leadership of Beth Shaw McGuire, and in collaboration with curators and University and community partners, the education staff will generate the content for all published materials; Communications staff works with designers to create the signature look and template for *FYI*; Public programs will be suggested by Ackland educators and the office of visitor services.
2. Evaluation: Focus groups convene to assess the materials and consider how the materials and programs meet the objectives of *FYI*.
3. Refinement: Based on focus group feedback, the Ackland educators will refine the offerings.
4. Publication and promotion: Final plans for programming established; Materials delivered to printing services; *FYI* and exhibition press packets released.
5. Final evaluation: The staff will tally attendance records, visitor comments, and surveys and incorporate their findings into the design of the next *FYI*.

The attached detailed budget represents estimates based on this year's costs for printing, advertising, and speaker honoraria.

7. Project Resources: Personnel and Technology

Senior museum educator Beth Shaw McGuire will direct the project, working closely with museum educator Leslie Balkany. McGuire and Balkany have demonstrated ability in developing resources for learners of all ages. Both are regular presenters at national gatherings for museum educators, and their exceptional work has recognized by their colleagues nationwide. Anna Lorenz, director of visitor services, will work closely with McGuire and Balkany to plan *FYI* programming. Maria Gloeggler, director of communications will oversee the design of all published materials and generate the marketing plan for *FYI*. All published materials will meet the Ackland's rigorous standards of excellence for publications.

Project Budget Form

SECTION 1: SUMMARY BUDGET

Name of Applicant Organization Ackland Art Museum, The University of North Carolina at Chapel Hill

IMPORTANT! READ INSTRUCTIONS ON PAGES 3.4-3.5 BEFORE PROCEEDING.

DIRECT COSTS

	IMLS	Applicant	Total
SALARIES & WAGES	<u>0</u>	<u>12,111</u>	<u>12,111</u>
FRINGE BENEFITS	<u>0</u>	<u>3,370</u>	<u>3,370</u>
CONSULTANT FEES	<u>3,650</u>	<u>0</u>	<u>3,650</u>
TRAVEL	<u>1,800</u>	<u>0</u>	<u>1,800</u>
MATERIALS, SUPPLIES & EQUIPMENT	<u>3,600</u>	<u>0</u>	<u>3,600</u>
SERVICES	<u>2,050</u>	<u>675</u>	<u>2,725</u>
OTHER	<u>2,500</u>	<u>0</u>	<u>2,500</u>
TOTAL DIRECT COSTS	\$ <u>13,600</u>	\$ <u>16,157</u>	\$ <u>29,757</u>
INDIRECT COSTS	\$ <u>2,720</u>	\$ <u>10,850</u>	\$ <u>13,570</u>
TOTAL PROJECT COSTS			\$ <u>43,327</u>

AMOUNT OF CASH-MATCH \$ 675

AMOUNT OF IN-KIND CONTRIBUTIONS \$ 26,335

TOTAL AMOUNT OF MATCH (CASH & IN-KIND CONTRIBUTIONS) \$ 27,010

AMOUNT REQUESTED FROM IMLS, INCLUDING INDIRECT COSTS \$ 16,320

PERCENTAGE OF TOTAL PROJECT COSTS REQUESTED FROM IMLS 38 %
(MAY NOT EXCEED 50%)

Have you received or requested funds for any of these project activities from another federal agency?
(Please check one) ☐ Yes ☒ No

If yes, name of agency _____

Request/Award amount _____

Project Budget Form
Section 1: Detailed Budget
Year 1 - Budget Period from August 1, 2005 to July 31, 2006
Name of Applicant Organization: Ackland Art Museum, UNC-Chapel Hill

Salaries & Wages (Permanent Staff)

Name/Title:	No.	Method of Computation			IMLS	Applicant	Total
[REDACTED]	1	\$41,500	x	5%	\$0	\$2,075	\$2,075
[REDACTED]	1	\$38,000	x	10%	\$0	\$3,800	\$3,800
[REDACTED]	1	\$36,686	x	5%	\$0	\$1,834	\$1,834
[REDACTED]	1	\$38,250	x	2%	\$0	\$765	\$765
Total Salaries and Wages:					\$0	\$8,474	\$8,474

Fringe Benefits

Rate	Salary base	IMLS	Applicant	Total
Permanent Staff: 19%	\$8,474	\$0	\$1,610	\$1,610
plus hospitalization \$3431/yr.		\$0	\$755	\$755
prorated x percent of effort				
Total Fringe Benefits:		\$0	\$2,365	\$2,365

Consultant Fees

Name/Type of Consultant	Rate of Computation	IMLS	Applicant	Total
[REDACTED]	\$350 x 2	\$700	\$0	\$700
Total Consultant Fees:		\$700	\$0	\$700

Travel

	Subsistence and travel	IMLS	Applicant	Total
Travel for speakers and performers	\$300 x 3	\$900	\$0	\$900
Total Travel Costs:		\$900	\$0	\$900

Materials, Supplies and Equipment

	Method of Cost Computation	IMLS	Applicant	Total
Project-related consumables (toner cartridges, paper, etc.)	Actual cost	\$200	\$0	\$200
Gallery brochure for Family Legacies	design and printing of 1000 copies	\$1,000	\$0	\$1,000
Three one-page handouts (Family Legacies)	Actual cost	\$250		\$250
Take home materials for K-12 students	10,000 promotional items: stickers for students (\$.05 each) bookmark for students	\$500	\$0	\$500
Focus group handouts x 3 meetings	\$50 x 3 meetings	\$150	\$0	\$150
Total cost of materials, Supplies & Equipment:		\$2,100	\$0	\$2,100

2100

Project Budget Form
 Section 1: Detailed Budget Continued
Year 1 - Budget Period from August 1, 2005 to July 31, 2006
 Name of Applicant Organization: Ackland Art Museum, UNC-Chapel Hill

Services	Method of Cost Computation	IMLS	Applicant	Total
Focus group participant fees x 3 meetings	7 participants x 3 meetings x \$25/each	\$525	\$0	\$525
Evening Performance fees	\$750 x 2	\$1,500	\$0	\$1,500
Community Day musical group fee	Actual cost	\$500	\$0	\$500
Security services for evening events	\$225 x 2 events	<u>\$0</u>	<u>\$450</u>	<u>\$450</u>
Total Services Costs:		\$2,525	\$450	\$2,975

Other

Advertising for Community Day	actual cost	\$500	\$0	\$500
Advertising for Performance Events	actual cost	<u>\$1,000</u>	<u>\$0</u>	<u>\$1,000</u>
Total Other Costs:		\$1,500	\$0	\$1,500

Total Direct Project Costs **\$7,725** **\$11,289** **~~\$18,764~~**

19014

Indirect Costs: an indirect cost rate negotiated with a federal agency (copy attached).
 Department of Health & Human Services, expiration date June 30, 2002

Rate Base: 46%* \$18,764 \$8,632

	IMLS	Applicant	Total
Total indirect costs charged to:	\$1,545	\$7,087	\$8,632

*The University of North Carolina at Chapel Hill has agreed to cost-share all the indirect costs on this proposal except for 20% applied to IMLS direct costs.

Total Project **\$9,270** **\$18,376** **\$27,646** *dlc*

Project Budget Form
Section 1: Detailed Budget
Year 2 - Budget Period from August 1 to December 31, 2006
Name of Applicant Organization: Ackland Art Museum, UNC-Chapel Hill

Salaries & Wages (Permanent Staff)

<i>Name/Title:</i>	<i>No.</i>	<i>Method of Computation</i>	<i>IMLS</i>	<i>Applicant</i>	<i>Total</i>
[REDACTED]	1	\$42,745 x 5%	\$0	\$891	\$891
[REDACTED]	1	\$39,140 x 10%	\$0	\$1,631	\$1,631
[REDACTED]	1	\$37,787 x 5%	\$0	\$787	\$787
[REDACTED]	1	\$39,398 x 2%	<u>\$0</u>	<u>\$328</u>	<u>\$328</u>
Total Salaries and Wages:			\$0	\$3,637	\$3,637

Fringe Benefits

<i>Rate</i>	<i>Salary base</i>	<i>IMLS</i>	<i>Applicant</i>	<i>Total</i>
Permanent Staff: 19%	\$3,637	\$0	\$691	\$691
plus hospitalization \$3431/yr. prorated x percent of effort		\$0	<u>\$315</u>	<u>\$315</u>
Total Fringe Benefits:		\$0	\$1,006	\$1,006

Consultant Fees

<i>Name/Type of Consultant</i>	<i>Rate of Computation</i>	<i>IMLS</i>	<i>Applicant</i>	<i>Total</i>
[REDACTED]	\$350 x 2	\$700	\$0	\$700
		<u>\$0</u>	<u>\$0</u>	<u>\$0</u>
Total Consultant Fees:		\$700	\$0	\$700

Travel

	<i>Subsistence and travel</i>	<i>IMLS</i>	<i>Applicant</i>	<i>Total</i>
Travel for speakers and performers	\$300 x 3	<u>\$900</u>	<u>\$0</u>	<u>\$900</u>
Total Travel Costs:		\$900	\$0	\$900

Materials, Supplies and Equipment

	<i>Method of Cost Computation</i>	<i>IMLS</i>	<i>Applicant</i>	<i>Total</i>
Project-related consumables (toner cartridges, paper, etc.)	Actual cost	\$100	\$0	\$100
Gallery Guide (Body of God)	Design & printing of 1,000 copies	\$1,000	\$0	\$1,000
Three one-page handouts	Design & printing of 1,000 copies	\$250	\$0	\$250
Focus group handouts x 3 meetings	\$50 x 3 meetings	<u>\$150</u>	<u>\$0</u>	<u>\$150</u>
Total cost of materials, Supplies & Equipment:		\$1,500	\$0	\$1,500

Project Budget Form
 Section 1: Detailed Budget Continued
Year 2 - Budget Period from August 1 to December 31, 2006
 Name of Applicant Organization: Ackland Art Museum, UNC-Chapel Hill

Services	<i>Method of Cost Computation</i>	<i>IMLS</i>	<i>Applicant</i>	<i>Total</i>
Focus group participant fees x 3 meetings	7 participants x 3 meetings x \$25/ea	\$525	\$0	\$525
Evening Performance Fee (Body of God)	Actual rate	\$750	\$0	\$750
Community Day musical group fee	Actual cost	\$500	\$0	\$500
Security services for evening event	Actual cost	<u>\$0</u>	<u>\$225</u>	<u>\$225</u>
Total Services Costs:		\$1,775	\$225	\$2,000

Other	<i>Method of Cost Computation</i>	<i>IMLS</i>	<i>Applicant</i>	<i>Total</i>
Advertising for Community Day	actual cost	\$500	\$0	\$500
Advertising for Performance Event	actual cost	<u>\$500</u>	<u>\$0</u>	<u>\$500</u>
Total Other Costs:		\$1,000	\$0	\$1,000

Total Direct Project Costs	\$5,875	\$4,867	\$10,742/3
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Indirect Costs: an indirect cost rate negotiated with a federal agency (copy attached).
Department of Health & Human Services, expiration date June 30, 2002

Rate Base: 46%*	\$10,742		\$4,942
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Total indirect costs charged to:	<i>IMLS</i> \$1,175	<i>Applicant</i> \$3,767	<i>Total</i> \$4,942
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*The University of North Carolina at Chapel Hill has agreed to cost-share all the indirect costs on this proposal except for 20% applied to IMLS direct costs.

Total Project	\$7,050	\$8,634	\$15,684/5
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BUDGET NOTES: Ackland matching funds will be provided by unrestricted gifts and donations, endowment income, and state funds.

Salaries and Wages: The Museum has assigned current full-time permanent staff to develop, manage, and implement the activities of this project as a portion of their regular duties. Year 2 includes a projected cost-of-living raise of 3% for staff. The project management team consists of the following permanent staff:

- [REDACTED] Will dedicate 5% of her time in both years to serve as project director, oversee and manage all aspects of the project. She will co-facilitate the focus groups with Balkany, lead the evaluation process of the project materials and programming, and oversee the writing of interim and final project reports. McGuire has worked at the Ackland since 1990 and has experience being a project manager on grants and has been involved with project evaluation.
- [REDACTED] Will dedicate 10% of her time in both years to development of project materials and handouts using the vast archives of materials staff has produced for previous projects. She will co-facilitate the focus groups with McGuire, and assist in evaluation of the project materials and programming. Balkany has worked at the Ackland since 1998 and has experience working on grant-funded projects involving data collection and evaluation.
- [REDACTED] Will dedicate 5% of her time in both years to the development, coordination, and implementation of programming for the project. As chair of the Ackland's Programs Committee she will work with museum staff to develop appropriate programs for each exhibition, handle all logistical arrangements needed for the events, and assist in the evaluation of the project. Lorenz has worked at the Ackland since spring 2004. Previously she was assistant director for membership and programs at the Harvard University Art Museums. She has five years experience in program and event planning and execution.
- [REDACTED] Will dedicate 2% of her time in both years to the development and implementation of a marketing plan for the project. She will work with designers and printers to produce high quality publications and handouts. She will assist in the evaluation of the project. Gloeggler has worked at the Ackland since June 2003. Previously she was associate director of marketing at Stromberg Consulting in New York.

Fringe Benefits: Standard university rates were utilized to calculate fringe benefits. Benefits (social security, state retirement, severance pay, and other costs related to compensation) are calculated at 19% of salary for permanent staff. Employer contribution rates for hospitalization equals \$3,431 per year prorated times percent of effort and is only available to permanent employees.

Consultant Fees: We will engage speakers for the community days. It has been our experience that such speakers charge approximately \$350. We will have one community day in each year (two speakers each year).

Travel: In addition to paying a fee we will reimburse performers and speakers for their travel expenses. We are estimating an average of \$300 per person. Expenses will vary greatly and may include mileage, ground transportation, hotel accommodations, and per diem for performers and speakers living outside the immediate area or the state. We will use allowable reimbursement rates established by the state of North Carolina: mileage: \$.375/mile, per diem and hotel: \$90/day.

Materials, Supplies, and Equipment: All items in this category will be purchased in accordance with the state of North Carolina purchasing guidelines, taking advantage of significant discounts offered through state contracts where possible.

- Consumable supplies such as paper, toner cartridges, etc., needed for the project.
- Each FYI gallery brochure and the accompanying handouts will be designed and printed by local expert vendors, such as Rivers Agency (design), Classic Graphics (printer). 1,000 copies of each brochure and handout will be printed for distribution. We will also produce take home items for each child and youth, such as stickers and bookmarks. We will produce 10,000 of each for distribution.
- Handouts for focus groups will be designed and printed in-house using the Ackland's staff and equipment.